

**NEBRASKA DEPARTMENT of HEALTH & HUMAN SERVICES (DHHS)
VITAL RECORDS ELECTRONIC BIRTH REGISTRATION SYSTEM
HOSPITAL REFERENCE TRAINING MANUAL**



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SCOPE AND TRAINING OBJECTIVES

Birth (Hospital) Personnel

Hospital Personnel will be responsible for data entry of the Birth record in a hospital setting. They will need to be familiar with the data entry process as a whole – which starts from sign-on, to calling up a new entry screen and/or searching for an existing Event record, to screen navigation and familiarity of field types, to working with the edit error process, the save and update functions and the informant verification process.

Additionally, printing will need to be mastered in terms of setting up printer / document associations as well as selection of the document type (worksheets, etc.) to be printed.

Other system functions such as basic table maintenance and the running of the hospital export and reports will be looked at as well.

TRAINING EVALUATION PROCEDURES

At the end of training, hospital personnel should be able to capably perform those tasks outlined above.

To help ensure this, at the end of each session, users will be asked to demonstrate competency in these tasks by actually performing them – for example, a record completion and save.

Ideally, informal training should continue after the formal training sessions have ended. This can be facilitated by giving users access to the training system in order for them to be able continue to practice those tasks reviewed by them during training.

A source of information is the Vital Records Partner Information Regarding Birth Registrations web site <http://www.dhhs.ne.gov/vitalrecords/partners/birth.htm>. The Birth Certificate How to Complete Guide is a source that should be used for more detailed instructions. For any additional questions that come up over time, they should be submitted to Nebraska DHHS staff. Contact either the Vital Records help desk at (402) 471-8275 or the Birth Registration Clerk at (402) 471-0907.

Please remember, this is not a final product. We plan on continually updating the system to meet the State's and Hospital's needs.

~

All suggestions that will make your training more complete, more relevant and more user-friendly are always welcome. Please let us know how we can better serve you.

We look forward to the training sessions ahead.

TRAINING SCHEDULE OVERVIEW

Birth Hospital Personnel

- **Sign-On**
- **Data Entry and Update**
- **Search and Work Queue**
- **Printing**
- **Reports**
- **Hospital Export**
- **Table Maintenance**
- **NetSmart Messaging and E-Mail**

SIGN-ON

- **Review of State Sign-On Procedures**

DATA ENTRY AND UPDATE

- **Overview** of screen layout and organization
Tabs, paragraphs and titling¹
- **Field Types**
Check box, date edit, dropdown, edit box, memo, signature, Required and optional fields
- **Functions**
Defaulted values, skip fields, sticky fields, auto-fill fields, filtering
- **Error Options**
Re-key the field, override edit, query the field
Edits and alerts², hint and help text
- **Review Errors / Queries Utility**
- **Save and Save No Edit**
- **Open Time for Event Entry**

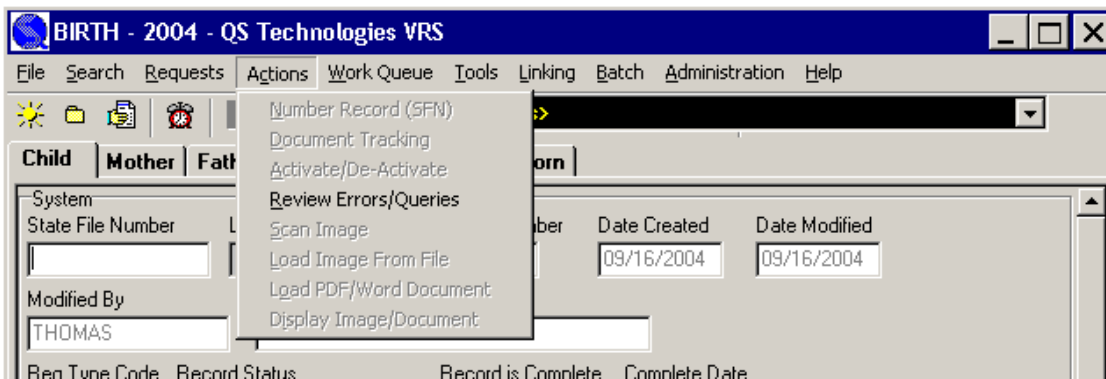
The **Event Entry Manual** Will Be Referenced.

¹ We will also review some shortcuts/hotkeys such as Alt#, CtrlP, 'T' on date fields, use of arrow key to scroll dropdown entries, etc.

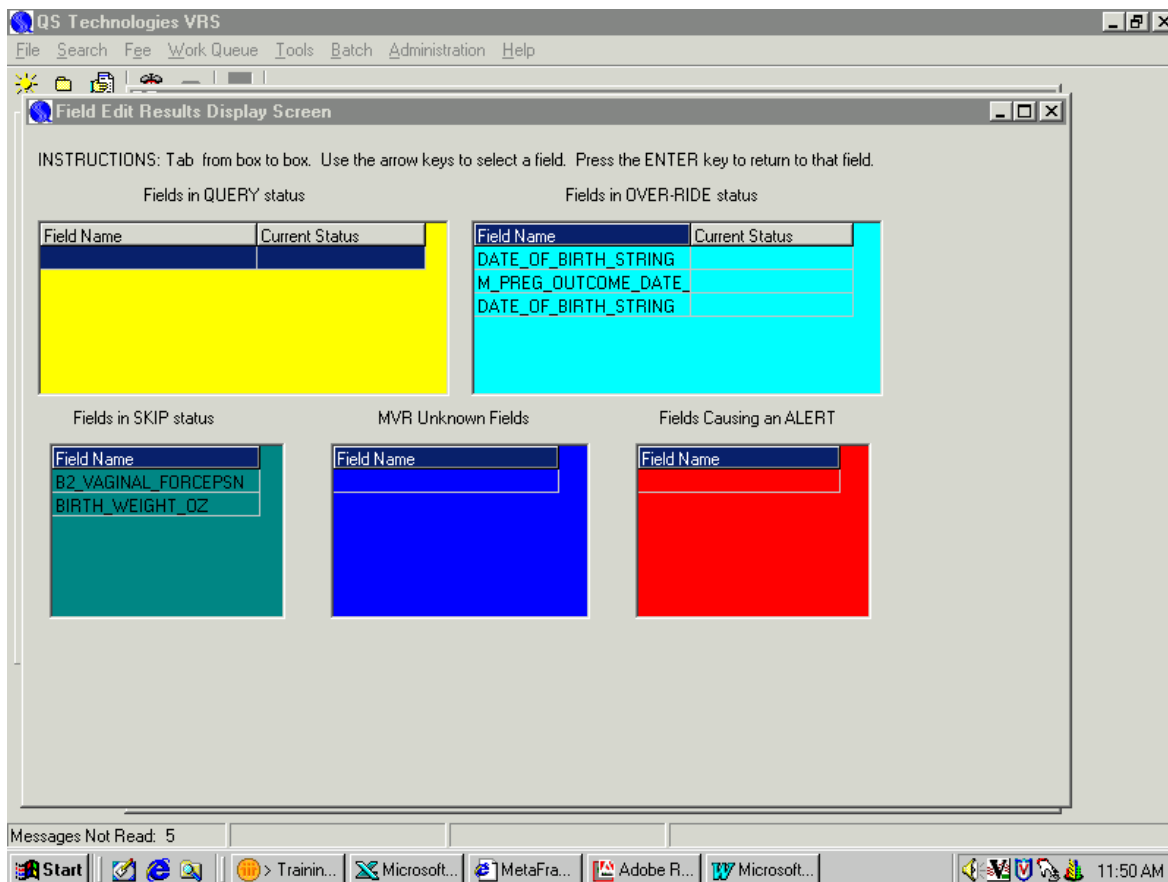
² Note that edits and alerts can be year specific.

REVIEW ERRORS / QUERIES UTILITY

- Selected From **Actions** Menu
- Use From Any Event Record / At Any Point In Record's Life Cycle
- Shows All Fields In Query, Over-Ride Or Skip Status, as well as those in MVR and Alert Status
- Fields Are Easily Navigated to from the Utility Screen



Actions Menu / Review Errors/Queries Selection



SEARCH AND WORK QUEUE

- Overview of Search screen
 - Which fields go on the Search screen?
 - How many fields to use?
 - Search, Display, Reset buttons
 - Types of records
 - Security
 - Views determined by sign-on
 - Views determined by Event year
- Search criteria

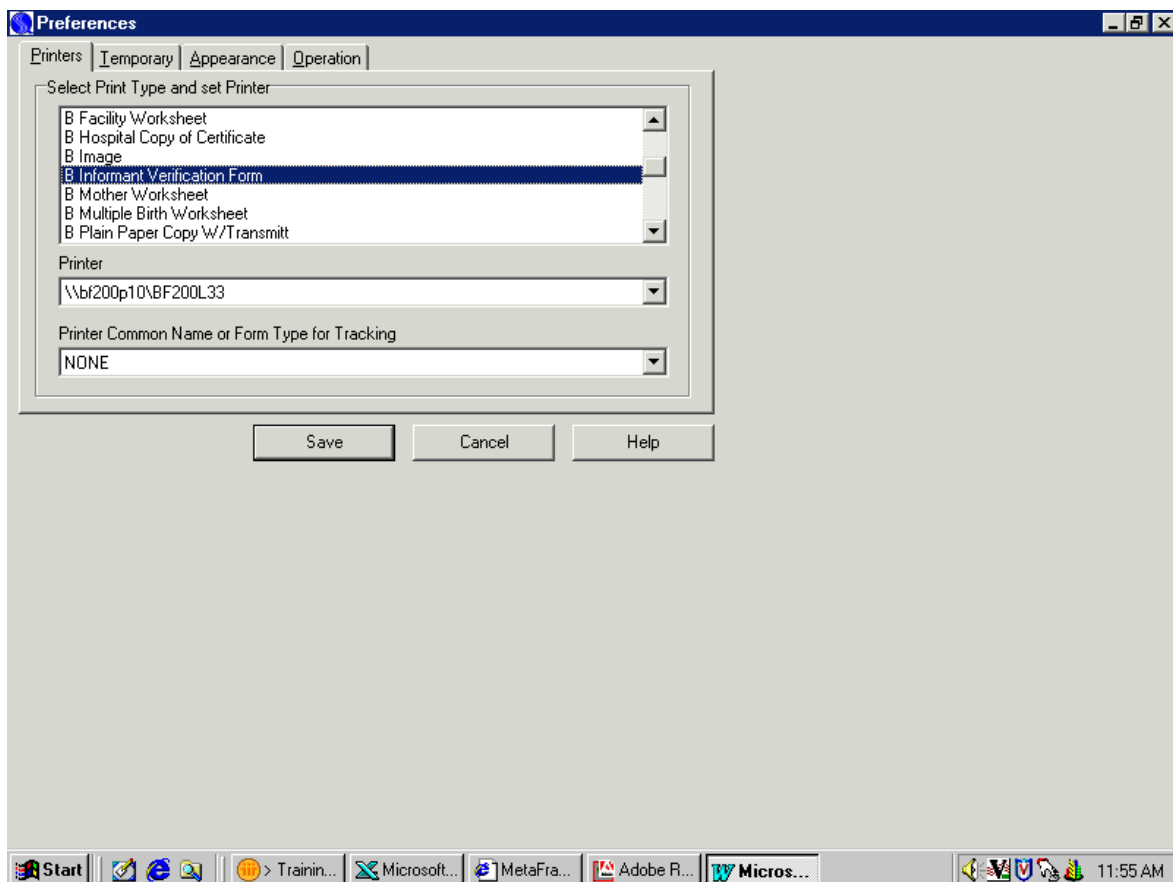
%	Smi%
—	Sm_th
,A or ,D	Ascending or D escending
NULL	
<>NULL	
(X + Y)	Records with a value <i>between</i> (and including) X and Y
IN(A+B+C)	Records with a value in that listed set
>,>=,<>,<,<=	Other operators
- Printing from Search Screen
- Bringing up an Event Record
- Work Queue Concepts
- Open Time for Search Practice

The **Searches Manual** Will Be Referenced.

PRINTING

- Printing from the Search Screen
- Printing from the Event Screen
- Setting Up Printer / Document Associations Through the Preferences Utility

If certain print jobs need to print to a certain printer that isn't your default, this is a good way to tie the document with the printer. This currently isn't as important since the drop down option was added that allows you to select which printer you want to print to.



Preference Utility – Printers Tab

- Open Time for Printing Documents

INFORMANT VERIFICATION

After data entry of the Birth record, a **Birth Informant Verification Form** is printed and reviewed by the Mother for accuracy. She can then either make corrections to the form for the hospital to update, or sign the form that the information is accurate. After corrections are made, another form can be printed for the mother to check and sign. The signed document should be kept by the hospital.

The Birth Informant Verification Form can be found by going to Requests and selecting the Print: B Informant Verification Form.

The screenshot displays the 'BIRTH - 2009 - Netsmart VRS' application window. The 'Requests' menu is open, showing options to print various forms, including 'Print: B Informant Verification Form'. The main window shows a birth record for a child named John Doe, born on 07/15/2009. The mother's name is Jane Doe, and her SSN is 456-78-9876. The record status is 'NORMAL'. The interface includes fields for mother's and child's names, SSN, date of birth, and time of birth. A 'NOTE PRESENT' banner is visible at the bottom of the window.

When accuracy is verified, the hospital data entry person can then mark the record as complete. There are additional edits that fire when the hospital complete question is changed from N to Y and saved. Any additional fields not passing edits will need corrected before submitting. With this complete status, the record will then show up in the appropriate Work Queue of either the State offices or of that for Douglas County.

If Douglas County or the State determines that something on the record is possibly not correct or needs further clarification, the record will be returned back to the hospital with comments of the problem area(s). These will be found in the Reject Queue. Once the record has been corrected or verified that the information is correct, then the hospital will return the record back to Douglas County or the State by selecting Y in the hospital complete field and adding any necessary comments and then saving the record.

NOTES

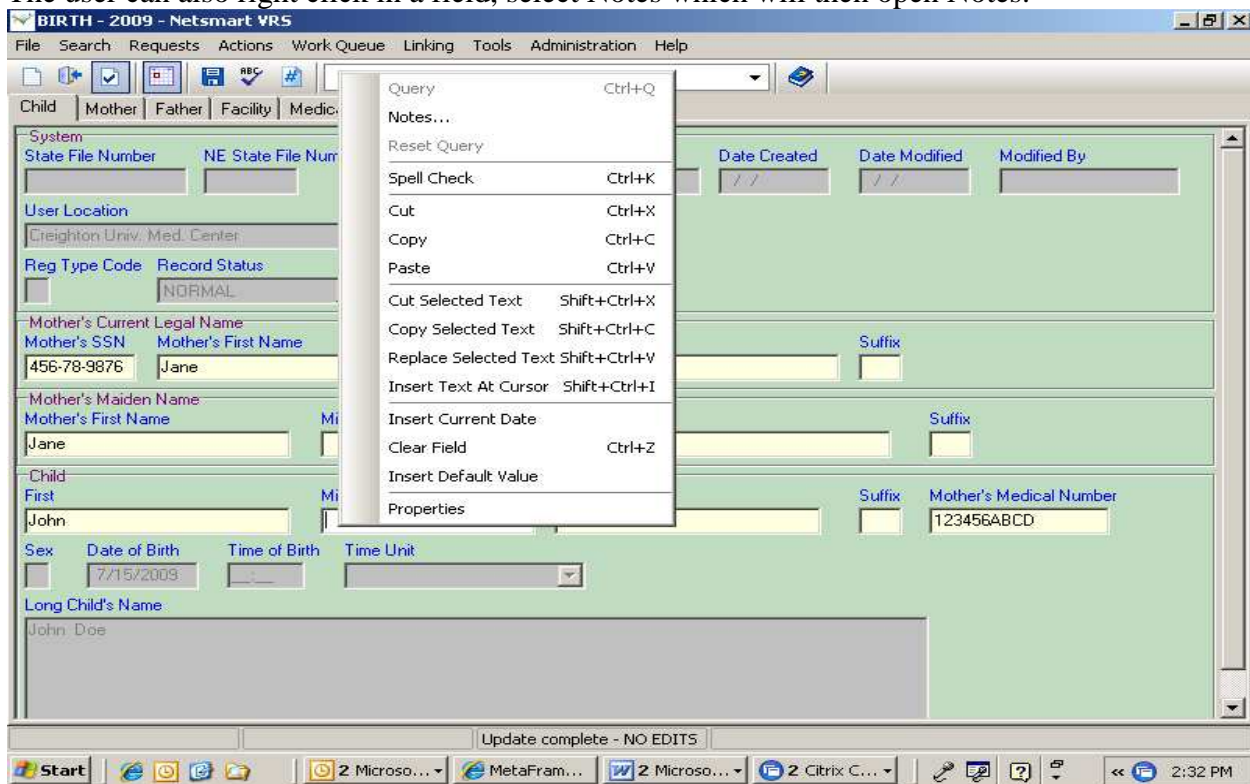
The user can also add a note to the record or a particular field even after the user has finalized the record by selecting Actions and Show Notes. However, it is preferred that the hospital comments section be primarily used for comments or notes (see Complete Tab). Only after the record has been finalized by the hospital (hospital complete=Y and saved) should the Notes feature be used.

The screenshot shows the 'BIRTH - 2009 - Netsmart VRS' application window. The 'Actions' menu is open, displaying options such as 'Number Record (SFN)', 'Document Tracking', 'Activate/De-Activate', 'Review Errors/Queries', 'Show Notes...', 'Scan Image', 'Load Image From File', 'Load PDF/Word Document', 'Display Image/Document', 'Type From Image', and 'Create CAS Records From Event'. The 'Show Notes...' option is highlighted. The background form displays patient information for 'John Doe', including 'Mother's SSN' (456-78-9876), 'Mother's First Name' (Jane), 'Mother's Last Name' (Doe), 'Child's First Name' (John), 'Child's Last Name' (Doe), 'Sex' (M), 'Date of Birth' (7/15/2009), and 'Mother's Medical Number' (123456ABCD). The status bar at the bottom indicates 'Update complete - NO EDITS'.

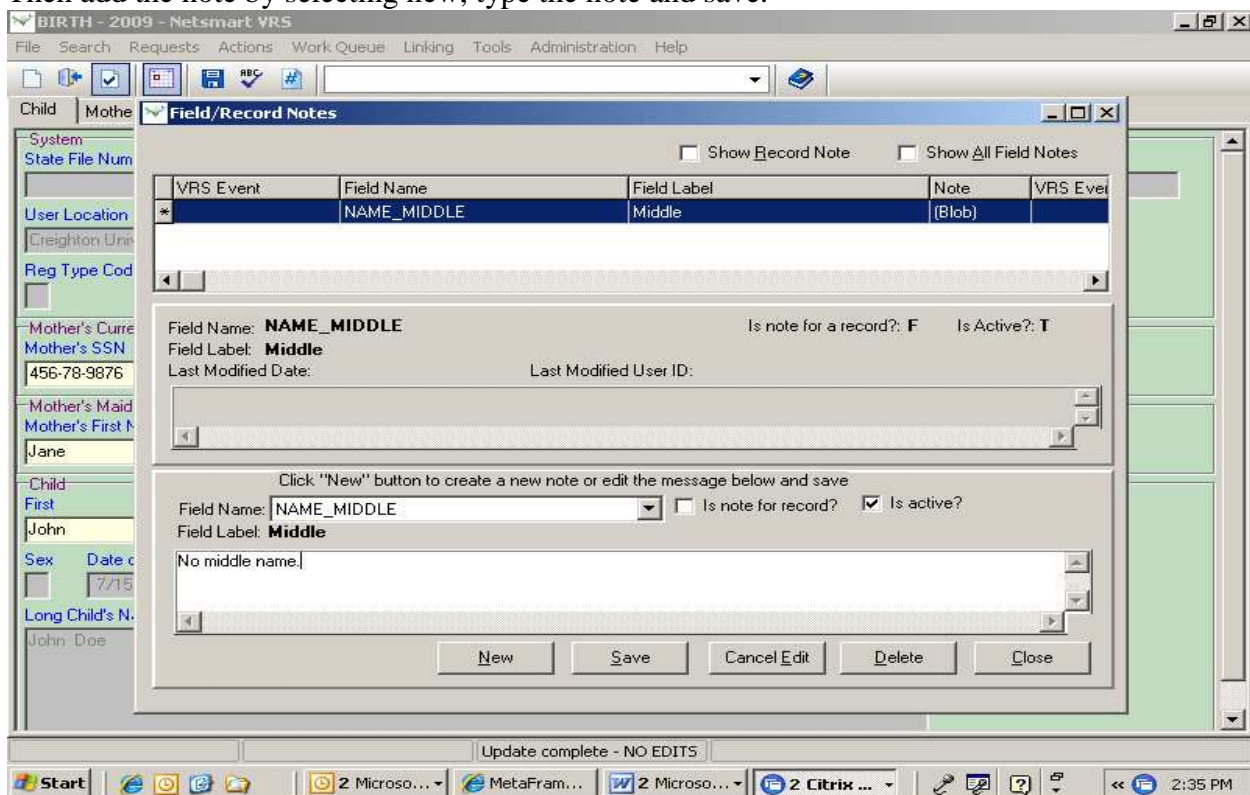
Select New, add the note and save.

The screenshot shows the 'BIRTH - 2009 - Netsmart VRS' application window with the 'Field/Record Notes' dialog box open. The dialog box has a table with columns: 'VRS Event', 'Field Name', 'Field Label', 'Note', and 'VRS Event'. The first row shows 'BIRTH', '--Record--', '(Record Note)', '(BLOB)', and '3215'. Below the table, there are fields for 'Field Name: --Record--', 'Field Label: (Record Note)', 'Last Modified Date: 07/15/2009', and 'Last Modified User ID: mmille2'. There are also checkboxes for 'Is note for a record?: T' and 'Is Active?: T'. At the bottom, there are buttons for 'New', 'Save', 'Cancel Edit', 'Delete', and 'Close'. The status bar at the bottom indicates 'Update complete - NO EDITS'.

The user can also right click in a field, select Notes which will then open Notes.



Then add the note by selecting new, type the note and save.



The next time the record is displayed, a green message at the bottom of the screen will indicate that a note is attached to the record. The user can display the message by going to Show Notes or by double clicking on the green Note Present message at the bottom of the screen.

BIRTH - 2009 - Netsmart VRS

File Search Requests Actions Work Queue Linking Tools Administration Help

<No Alerts>

Child Mother Father Facility Medical Newborn Flags Complete

System

State File Number	NE State File Number	Local File Number	Created By	Date Created	Date Modified	Modified By
		2009006516	MARK MILLER	07/15/2009	07/15/2009	MMILLE2

User Location
Creighton Univ. Med. Center

Reg Type Code **Record Status**
NORMAL

Mother's Current Legal Name

Mother's SSN	Mother's First Name	Middle	Last	Suffix
456-78-9876	Jane		Doe	

Mother's Maiden Name

Mother's First Name	Middle	Last	Suffix
Jane		Doe	

Child

First	Middle	Last	Suffix	Mother's Medical Number
John		Doe		123456ABCD

Sex **Date of Birth** **Time of Birth** **Time Unit**
07/15/2009 02:45 AM

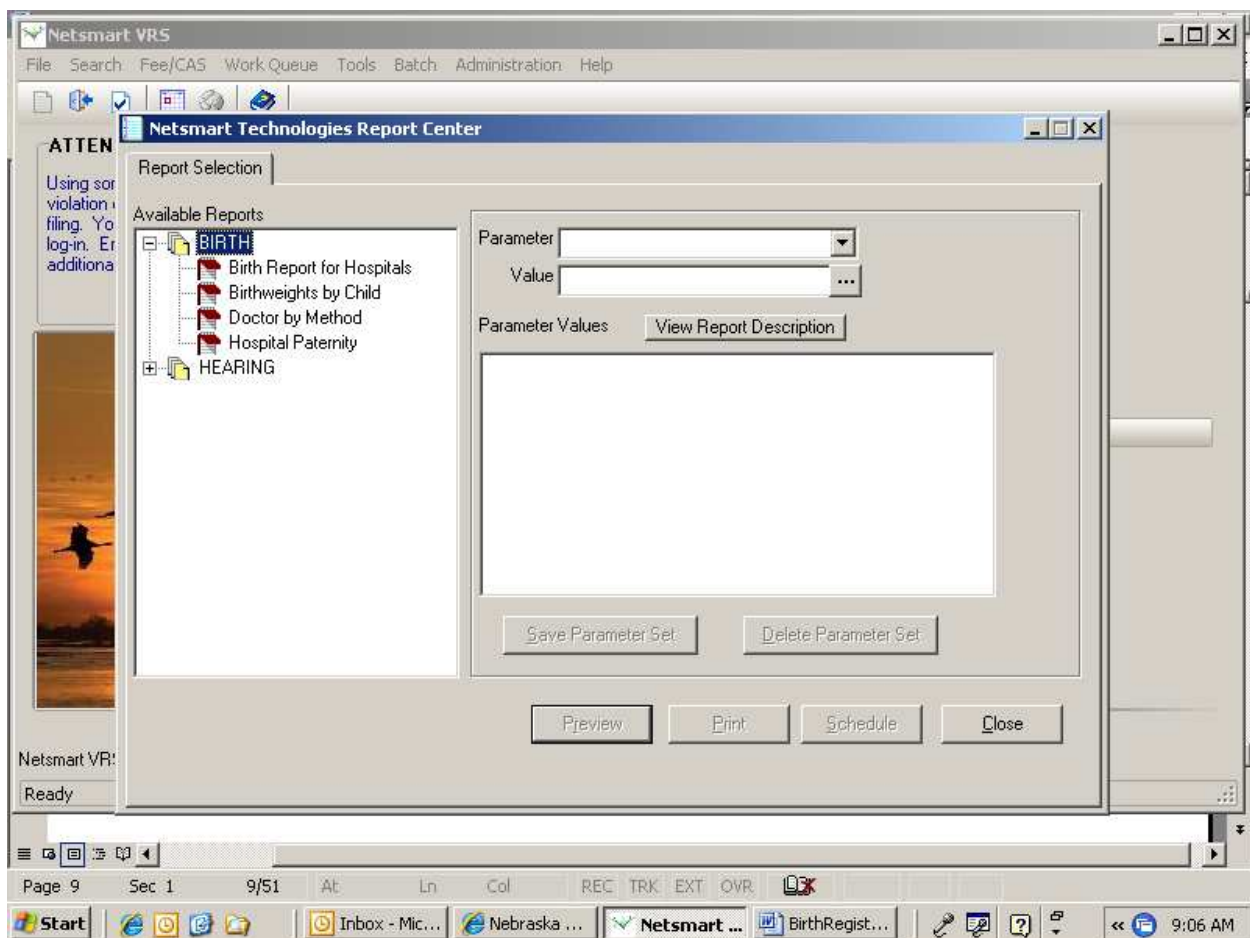
Long Child's Name
John Doe

NOTE PRESENT

Start 2 Microsoft... MetaFram... 2 Microso... 2 Citrix ... 2:40 PM

REPORTS

- Overview of Report Center
- Selecting a Report
- Entering Parameters
- Viewing a Report
- Printing a Report
- Saving a Parameter Set

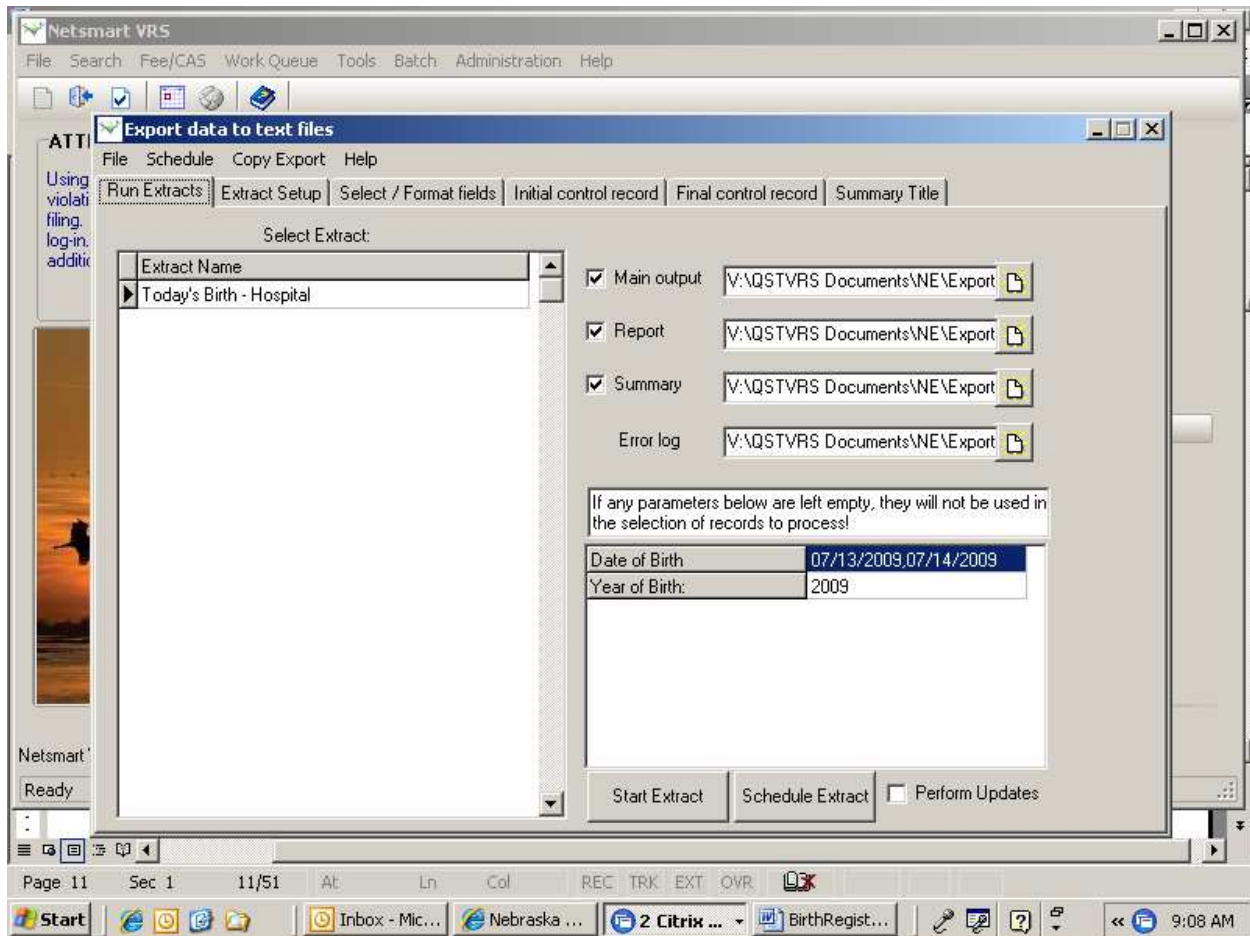


Report Center

- Open Time for Report Running Practice

HOSPITAL EXPORT

- **Todays Birth Records** Export Will Extract Date Range of Records
- Export Can Be Run Multiple Times Throughout The Day
- Export Will Be Protected Against Inadvertent Changes (Run Only Capability)



NetSmart Export Facility

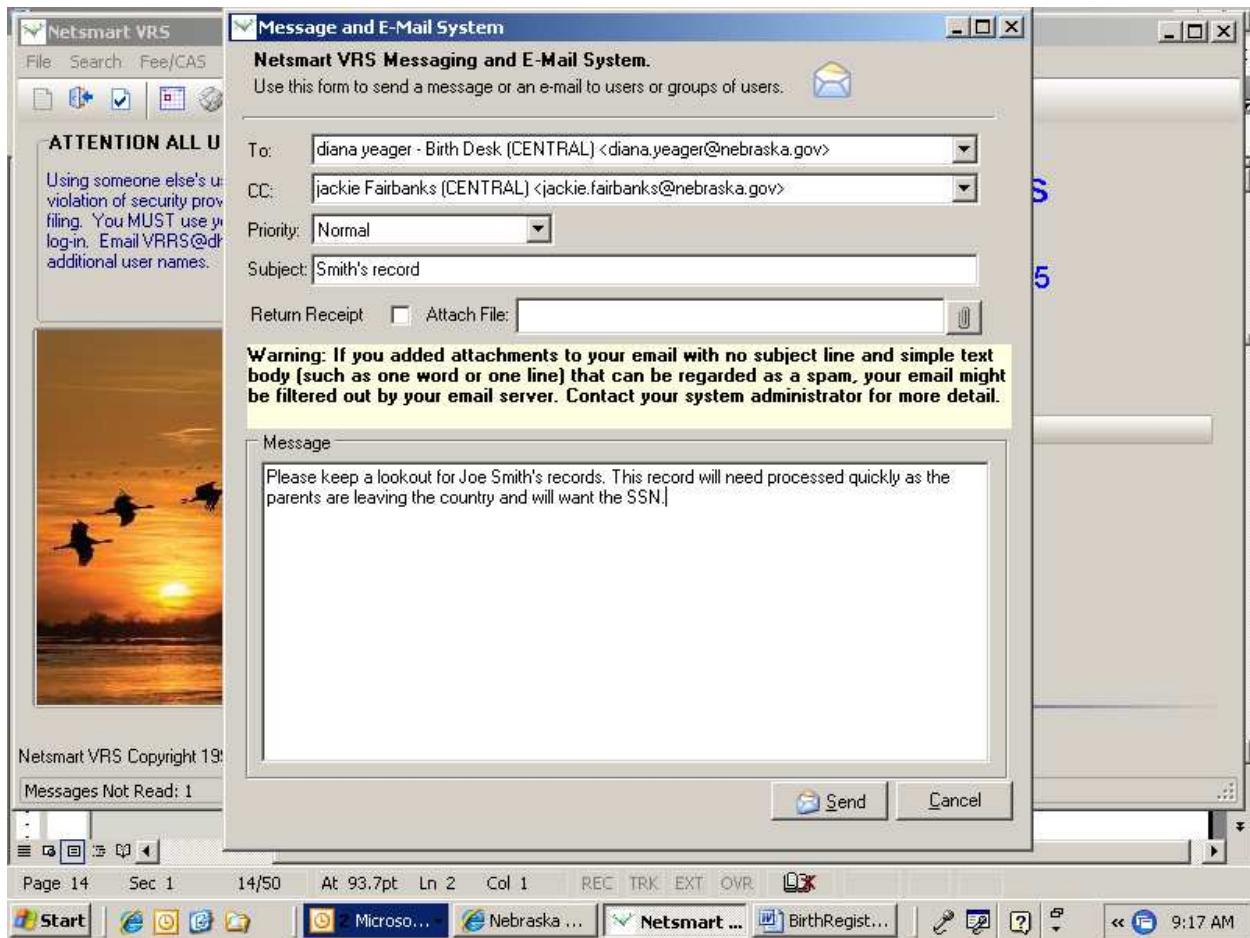
NETSMART MESSAGING AND EMAIL

- Accessing Messaging
- Composing and Sending a Message
 - Attaching Files
 - Assigning Priority
 - Return Receipt
- Message Notification
- Retrieving a Message
 - Search
 - Work Queue

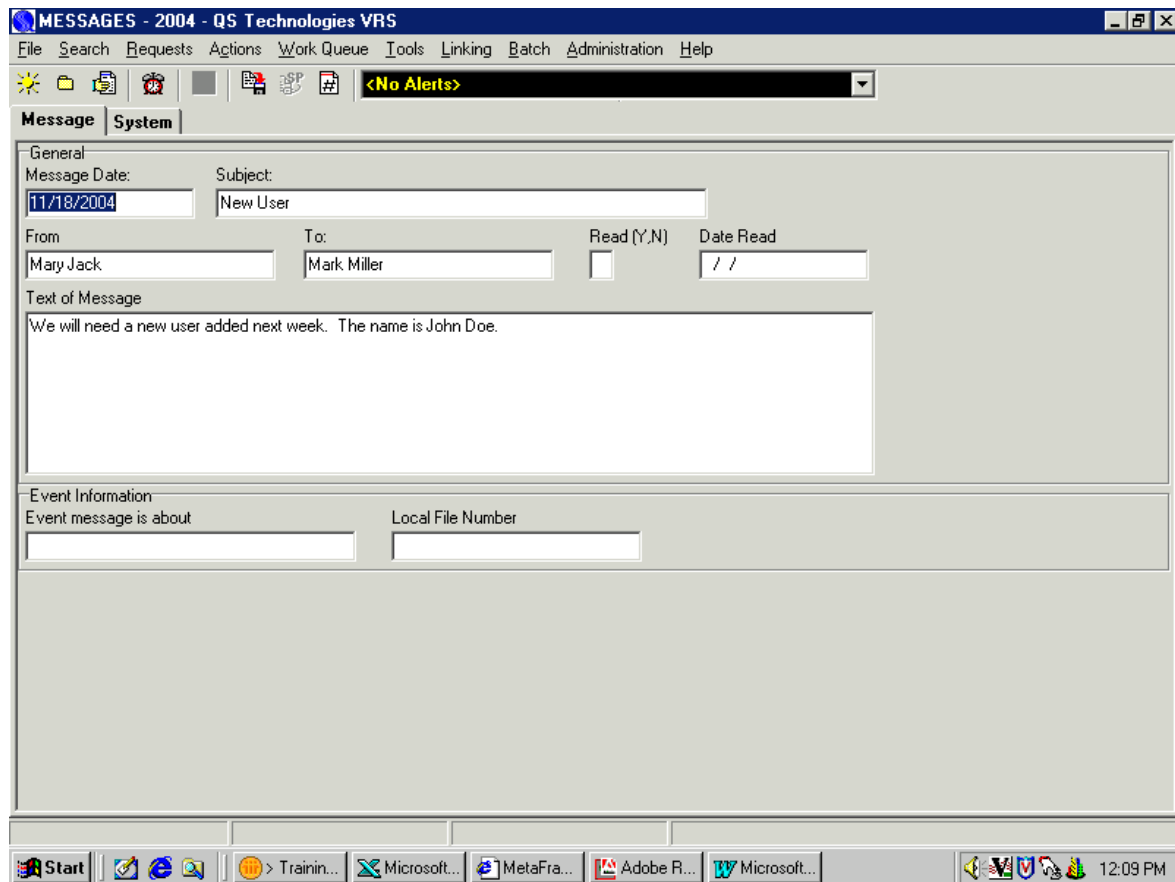


Message Notification on Opening Screen

- Open Time for Messaging Practice



Sending a Netsmart Message or E-Mail



A NetSmart Message As An Event Record

TRAINING REMINDERS

****IMPORTANT****--use File-Save or click on the Save Icon (diskette) under normal circumstances. When the record is saved, you will see an Update Complete at the bottom of the record. Only select save without edits if you have only partially completed the record and get interrupted or the worksheets are only partially filled out and you need to get more information. When this option is picked, at the bottom of the record you will see Update Complete-no edits.

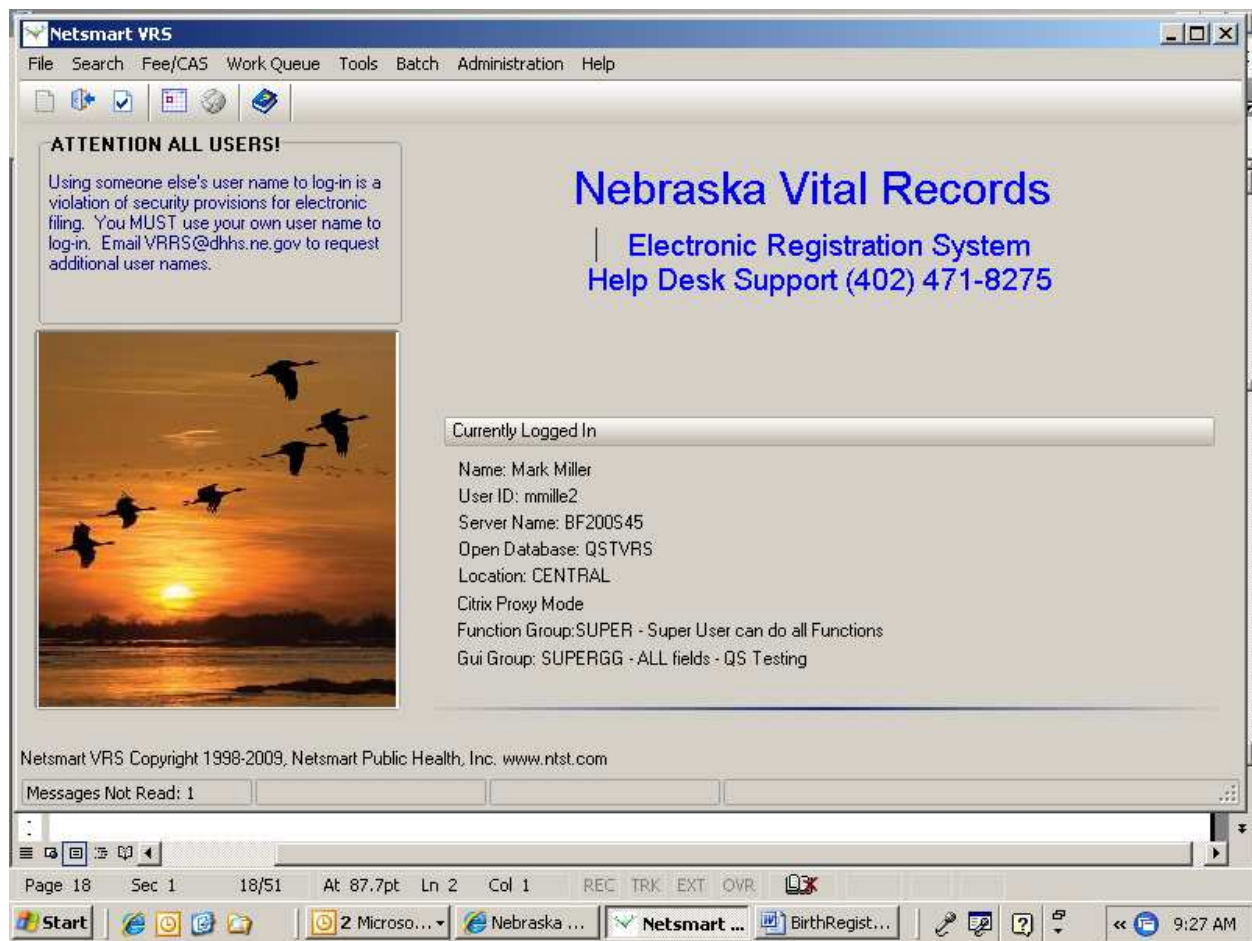
OTHER TRAINING REMINDERS (left blank for trainee use)

ATTACHMENTS

EVENT ENTRY MANUAL

SEARCHES & PRINTING MANUAL

TABLE MAINTENANCE MANUAL



EVENT ENTRY

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INTRODUCTION

An Event entry is the creation or modification of a record, such as a Birth. The software has various methods and tools to facilitate the entry process. This brief manual details some of these methods and tools.

DATA ENTRY CONCEPTS

The data entry screens can be displayed from the **File / New (Event)** dropdown or from selecting a record from the **Search** screen.



Opening NetSmart Screen – File/New Menu Path

Many of the Events also have shortcut key combinations that can be used to bring up a new Event record without the need to use a mouse to navigate through the menu path. On the menu shown above, note that the **Ctrl + B** combination will bring up a new **Birth** Event record.

The data entry screen is composed of **tabs**, **paragraphs**, and **fields**.

The **tabs** can be thought of as pages or major parts of the Event. In the screen below, we see the tabs **Child**, **Mother**, etc. The user can go quickly from one tab to another by clicking on the tab heading with the mouse or by pressing the **Alt #**, where the # is the tab number (**1, 2, 3,...**) to be accessed.

The screenshot shows a web application window titled "BIRTH - 2009 - Netsmart VRS". The window has a menu bar with "File", "Search", "Requests", "Actions", "Work Queue", "Linking", "Tools", "Administration", and "Help". Below the menu is a toolbar with icons for file operations and a search bar. The main content area is divided into tabs: "Child", "Mother", "Father", "Facility", "Medical", "Newborn", "Flags", and "Complete". The "Child" tab is currently selected and contains several sections:

- System**: Fields for "State File Number", "NE State File Number", "Local File Number", "Created By" (MARK MILLER), "Date Created" (// /), "Date Modified" (// /), and "Modified By".
- User Location**: A text field containing "Creighton Univ. Med. Center".
- Reg Type Code**: A dropdown menu with "NORMAL" selected.
- Mother's Current Legal Name**: Fields for "Mother's SSN", "Mother's First Name", "Middle", "Last", and "Suffix".
- Mother's Maiden Name**: Fields for "Mother's First Name", "Middle", "Last", and "Suffix".
- Child**: Fields for "First", "Middle", "Last", "Suffix", and "Mother's Medical Number".
- Sex**: A dropdown menu.
- Date of Birth**: A text field with "7 /".
- Time of Birth**: A text field.
- Time Unit**: A dropdown menu.
- Long Child's Name**: A large text area.

The Windows taskbar at the bottom shows the "Start" button and several open applications: "Inbox - Mic...", "MetaFram...", "BirthRegist...", and "2 Citrix ...". The system clock shows "12:00 PM".

Birth Event Data Entry Screen

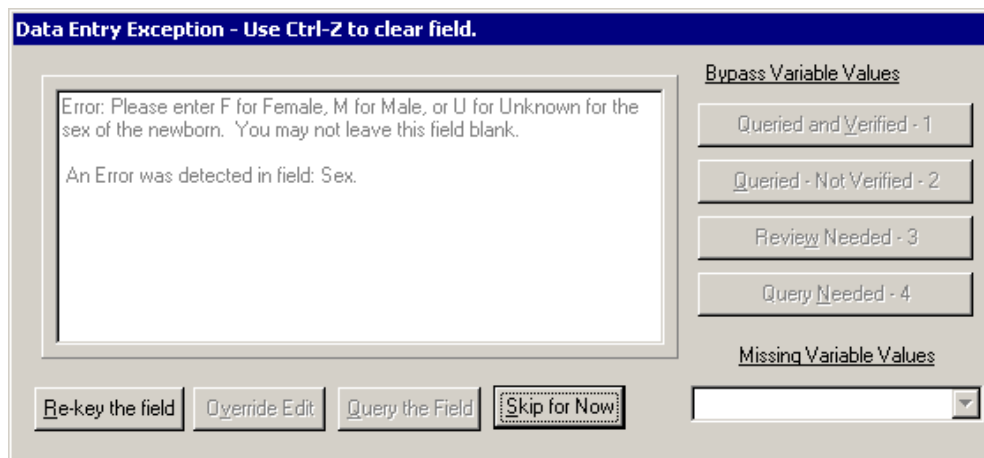
Each tab is composed of one or more **paragraphs**. These paragraphs have titles that usually pertain to some particular aspect of the Event. In the screen above, the **Child** tab contains the paragraphs **System**, **Mother Current Legal Name**, **Mother Maiden Name** and **Child**. The user can skip from one paragraph to the next by pressing **Ctrl-P**.

Each paragraph is composed of one or more **fields**. Available field types are **dropdown**, **edit**, **check box**, **edit mask**, **date edit**, **memo** and **signature**. Each field type has its own characteristics that are user defined. The user moves from field to field by pressing the **Tab** key or it will automatically advance (if the field allows for it) after the field is filled with the required number of characters.

The Event is saved into the database by accessing the **File / Save** dropdown menu, by pressing **Ctrl-S**, or by selecting the **Save** icon.

CORRECTING ERRORS

When a user enters invalid data, or the system determines that the data is not correct with relation to the system administrator-defined edits, an error message window appears. The user will at a minimum have the opportunity to either **Re-Key** the field or **Skip** the field for the time being and continue on with data entry for other fields of the Event. .



The image shows a 'Data Entry Exception' pop-up window. The title bar is blue with white text: 'Data Entry Exception - Use Ctrl-Z to clear field.' The main area is divided into two sections. The left section contains an error message: 'Error: Please enter F for Female, M for Male, or U for Unknown for the sex of the newborn. You may not leave this field blank.' Below this, it says 'An Error was detected in field: Sex.' The right section is titled 'Bypass Variable Values' and contains four buttons: 'Queried and Verified - 1', 'Queried - Not Verified - 2', 'Review Needed - 3', and 'Query Needed - 4'. Below these buttons is a section titled 'Missing Variable Values' with a dropdown menu. At the bottom of the window, there are four buttons: 'Re-key the field', 'Override Edit', 'Query the Field', and 'Skip for Now!'. The 'Skip for Now!' button is highlighted with a dashed border.

Data Entry Exception Pop-Up

OVERRIDES AND QUERIES

Depending upon the field and the given user's security role, options of **Override** and **Query** may also be available.

If a user **queries** a field, data regarding the error and field will be stored and further clarification can be made in the hospital notes under the complete tab. If a user **overrides** a field, that information is stored and reported on later, if needed.

FIELD EDIT RESULTS DISPLAY SCREEN

The **Field Edit Results Display Screen**, shown below, presents all fields within a given Event record that in one way or another need attention. The fields are grouped by category – such as those fields having **QUERY** status, those having **OVERRIDE** status, etc. – which are then displayed within separate windows upon the screen.

The screenshot shows a window titled "Field Edit Results Display Screen" with a blue title bar and standard window controls. Below the title bar, instructions read: "INSTRUCTIONS: Tab from box to box. Use the arrow keys to select a field. Press the ENTER key to return to that field." The main area is divided into five colored boxes, each representing a different status category:

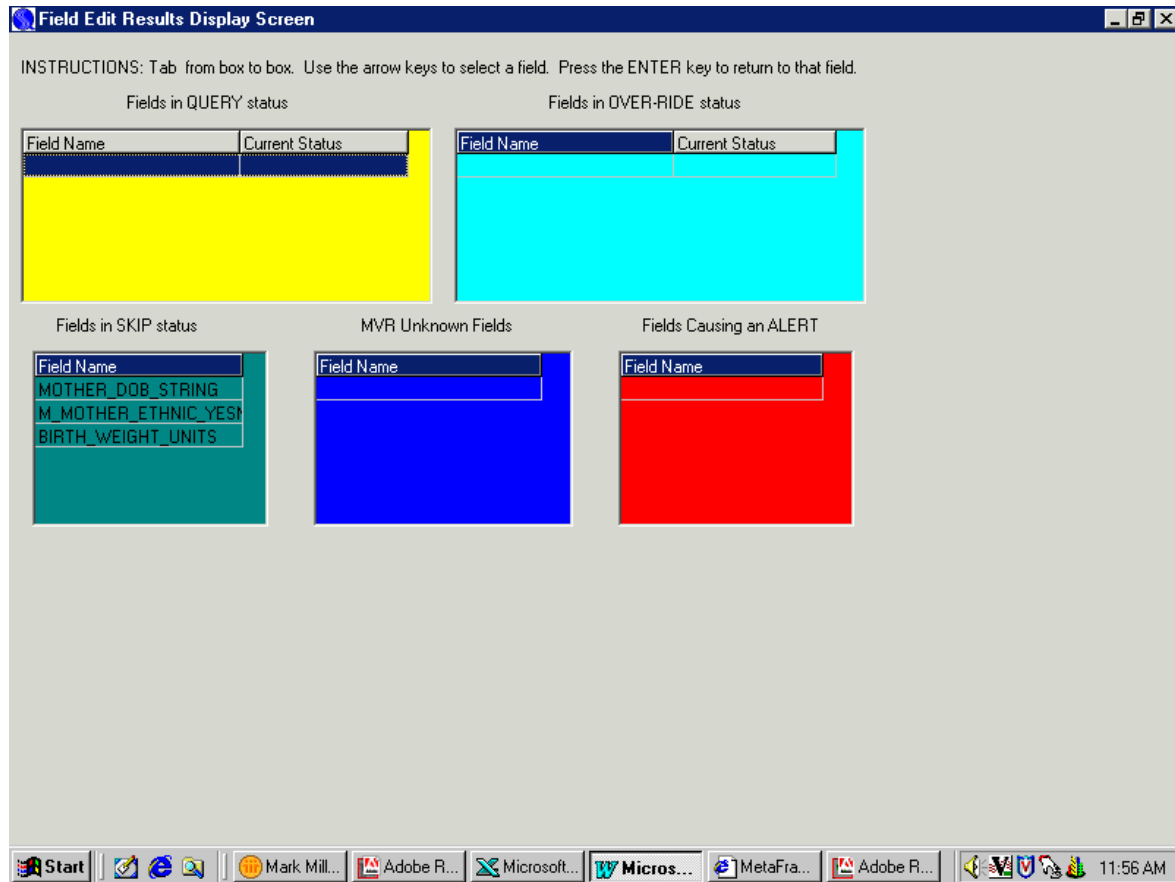
- Fields in QUERY status (Yellow):** Contains a table with two columns: "Field Name" and "Current Status". The "Field Name" column lists "FATHER_DOB_STRING" and "BIRTH_ORDER".
- Fields in OVER-RIDE status (Cyan):** Contains a table with two columns: "Field Name" and "Current Status". The "Field Name" column lists "M_CLD_UNKNOWN".
- Fields in SKIP status (Teal):** Contains a table with two columns: "Field Name" and "Current Status". The "Field Name" column lists "MOTHER_DOB_STR" and "GESTATION_WEEKS".
- MVR Unknown Fields (Blue):** Contains a table with two columns: "Field Name" and "Current Status".
- Fields Causing an ALERT (Red):** Contains a table with two columns: "Field Name" and "Current Status".

Field Edits Results Display Screen

The screen can be accessed at any time for a given Event record when that record is active (displayed) by following the **Actions / Review Errors/Queries** menu path. It is recommended that this be done before the hospital completes the record (hospital complete=Y).

When any of the entries upon the **Field Edits Results Display Screen** are clicked upon, the user is taken directly to that field. So, for example, clicking upon the **FATHER_DOB_STRING**

field found under the **Fields in QUERY status** window will take the user directly to the father's date of birth field under the **Father** Tab within the Birth Event.



Actions Menu Showing Review Errors / Queries Selection

KEYBOARD SHORTCUTS

Tab

The **Tab** key moves the user from field to field within the data entry form. Before the field is exited, it is edited for errors (unless the edits for the field are overridden or the field is queried). Fields are ordered left to right, top to bottom, in normal reading order. When the **Tab** key is pressed in the last enterable field on a page, the notebook selects the next page and the text cursor is placed in the first enterable field on that next page. If a page contains no enterable fields, it is skipped.

Shift-Tab

Shift-Tab moves the user to the previously held field. It will not automatically switch pages.

Alt-1 through Alt-9

These keys select notebook pages **1-9**, respectively.

Ctrl-Delete

If the text cursor is in a mask edit field (a field with slash or dash characters), the field will be cleared when **Ctrl-Delete** is pressed.

F1

Depressing **F1** displays context-sensitive help for the field containing the text cursor.

Ctrl-K

This spell checks the current field. Note that while spell checking is automatic for some fields, it is not for others (this is currently not on automatic for any of the birth fields). This control can force the checking of a text or memo field.

Ctrl-O

Ctrl-O sets the edit override indicator for the field containing the text cursor. This feature is new.

Ctrl-P

The data entry form is built from labeled boxes which are referred to as paragraphs (in Windows terminology, group boxes). Pressing **Ctrl-P** will move the text cursor from the present field to the first enterable field in the next paragraph.

Ctrl-Q

This sets the query indicator for the field containing the text cursor.

Ctrl-R

This shortcut removes the query or override indicator. Note, a field can be either overridden or queried, but not both.

Ctrl-C

This key copies the contents of the field containing the text cursor to the Windows clipboard. The field contents are not altered.

Ctrl-V

Ctrl-V pastes the contents of the Windows clipboard into the field containing the text cursor. The contents pasted by **Ctrl-V** replaces whatever may otherwise be in the field.

Ctrl-X

This shortcut clears the present field and copies its contents to the Windows clipboard. From the clipboard, it can be pasted into another data entry field, or into another Windows application which supports the clipboard.

Ctrl-Z

This key clears the contents of the field containing the text cursor.

T (F and B)

On many date fields the user can enter a “**T**”, for “today”, and the current system date will display. Additionally, the values “**F**”, for “forward” (the next following date), and “**B**”, for “back” (or, the immediately preceding date), are available. These values may be repeatedly entered to continue the process of either advancing or reversing the date one day at a time.

Alt-A through Alt-Z

Certain menu items have underscores under a letter in the item name. Pressing **Alt** plus that letter is equivalent to selecting the menu item.

Ctrl-S

This saves the current Event. This is equivalent to the **File / Save** menu item.

Left Mouse Click

The left mouse button can be used to place the text cursor in a particular field by clicking when the mouse cursor is over the desired field. The left mouse can also select notebook pages by clicking on the tab for the desired page.

Right Mouse Click

A menu of options for a field may be displayed by clicking the right mouse button when the mouse cursor is positioned over the field.

Alt-F4

This key combination closes the current window. It is equivalent to clicking the close gadget [X].

Ctrl-Tab

This key combination selects the next notebook page. When the last notebook page is displayed, this key combination then selects the first page.

Shift-Ctrl-Tab

This key combination selects the previous notebook.

Check Box Fields

A left mouse click will toggle the checked state of a check box field. Pressing the space bar when the field is selected also toggles the state. A selected check box field is indicated by a dashed line around the field description.

Combo Box Fields

Combo box fields, those fields associated with a dropdown list of values, are indicated by a small box with an inverted triangle to the right of the field. When a combo box is selected, several keys are operative. **Up** and **Down** arrows change the field contents to the next available value from the list. **Ctrl-Up** and **Ctrl-Down** arrows toggle the display, or non-display, of the selection list. Clicking on the inverted triangle with the left mouse button also toggles the drop-down list. Typing a partial character string when the field is selected will position the list to the first selection that begins with that string. For example, in a list of US States, typing “A” positions to “Alabama” and “ALAS” positions to “Alaska”. Note: there is a timer involved in recognizing partial string typing. If one types “AL”, “Alabama” is displayed. If one pauses between the “A” and the “L”, then “Alabama” is displayed after the “A” is typed and “Louisiana” after the “L”.

RIGHT MOUSE CLICK

The right-click field menu offers these options:

Cut (Ctrl-X)

This option clears the present field and copies its contents to the Windows clipboard. From the clipboard, it can be pasted into another data entry field, or into another Windows application which supports the clipboard.

Paste (Ctrl-V)

This key pastes the contents of the Windows clipboard into the field containing the text cursor. The contents being pasted replace whatever may otherwise be in the field.

Copy (Ctrl-C)

This key copies the contents of the field containing the text cursor to the Windows clipboard. The field contents are not altered.

Query (Ctrl-Q)

This sets the query indicator for the field containing the text cursor. This feature is new.

Override (Ctrl-O)

This sets the edit override indicator for the field containing the text cursor. This feature is new.

Reset Query/Override (Ctrl-R)

This removes the query or override indicator. Note that a field can be either overridden or queried, but not both.

Insert Current Date

This inserts the current date into the field containing the text cursor.

Insert Default Value

If a default value is defined for this field, this option inserts it in the current field.

Clear Field

This clears the contents of the field.

Properties

This option displays a window containing detailed settings for the current field. Normally this feature is only used in troubleshooting problems.

NOTES:



SEARCHES & PRINTING

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INTRODUCTION

To search for a record, first click on **Search** from the menu bar. This can be done from either the opening screen or from an Event screen as is shown below.

This will display those modules for which searches can be performed by you. Note that different users, because of having different Security Roles, will have different options available.



Search Menu

After selecting the module, in our example, **Birth**, a screen similar to the following will be displayed.

Birth Search Screen

On the **Search Screen**, first note that there are two tabs – the **Search** tab and the **Results** tab.

The **Search** tab is where the criteria for the search are entered. The **Results** tab is where the results (record entries, if any) of that search is displayed.

Please note here that the fields shown on your screen may vary from those shown on the screen

presented above. Your site administrator, has the ability to place any field found on the Event screen unto the **Search Screen** and so your **Search Screen** can evolve over time to meet any changing business requirements.

In other words, any number of fields can be brought unto the **Search Screen (Search tab)** from its corresponding Event record. And, additionally, these fields can also be re-ordered in any manner that makes most sense to the department.

SEARCH CRITERIA

Fields included on the **Search** tab have been selected for their relevancy to the search for each Event. They typically include name fields, key date fields, facility fields and the like. Any one of these fields by itself is sufficient to institute the search. For example, a name field alone will yield search results. If, however, you wish to refine the search, additional search criteria can be entered in additional fields thereby narrowing the results set.

Note, though, that while a greater number of fields used in the search will result in a more refined set of results, **each** of the criteria entered becomes part of the match process and this, in turn, necessitates a greater accuracy in those criteria that are entered. Entering '**Betty**' for a woman's first name, for example, will cause the entire search to fail if the person's name is known to the system as '**Elizabeth**'.

In addition to entering exact information for the search, other options are possible.

% - The **percent sign** allows the user to not enter some letters in the search field. For example, if the exact spelling of the child's last name is not known, the user could enter the characters of the child's last name that are known and use the **%** to signify the remaining letters.

If, for example, "**Smi%**" is used in the search field, it would find and display all records that started with "**Smi**". Or, if the last part of the child's name was known, the user could enter "**%son**" to locate all names that ended in "**son**".

_ (the **underline character**) – This character is used to denote that exactly **1** letter is unknown and can be anything.

,A or **,D** – When a "**,A**" is put in a search field, the resulting records will displayed in **ascending** order on that field. If a "**,D**" is put in a search field, the results will be in **descending** order on that field. This is used when a large result is expected. It can be used in combination with other search criteria.

NULL – When this word is used in a search field, the records with an empty (or, **null**) value are displayed. For example, this might be used in the **State File Number** field to display those records that have not been numbered yet.

<> NULL – This indicates a **not** null, or not empty, value – i.e., some sort of value is present.

(X+Y) – This is interpreted as “**Search for records that have a value BETWEEN X and Y**”. This actually includes the values **X** and **Y** too. This can be used for any field including the state file number and the date fields that are true dates and not just string representations of the dates. True dates are usually the dates that cannot have an unknown component.

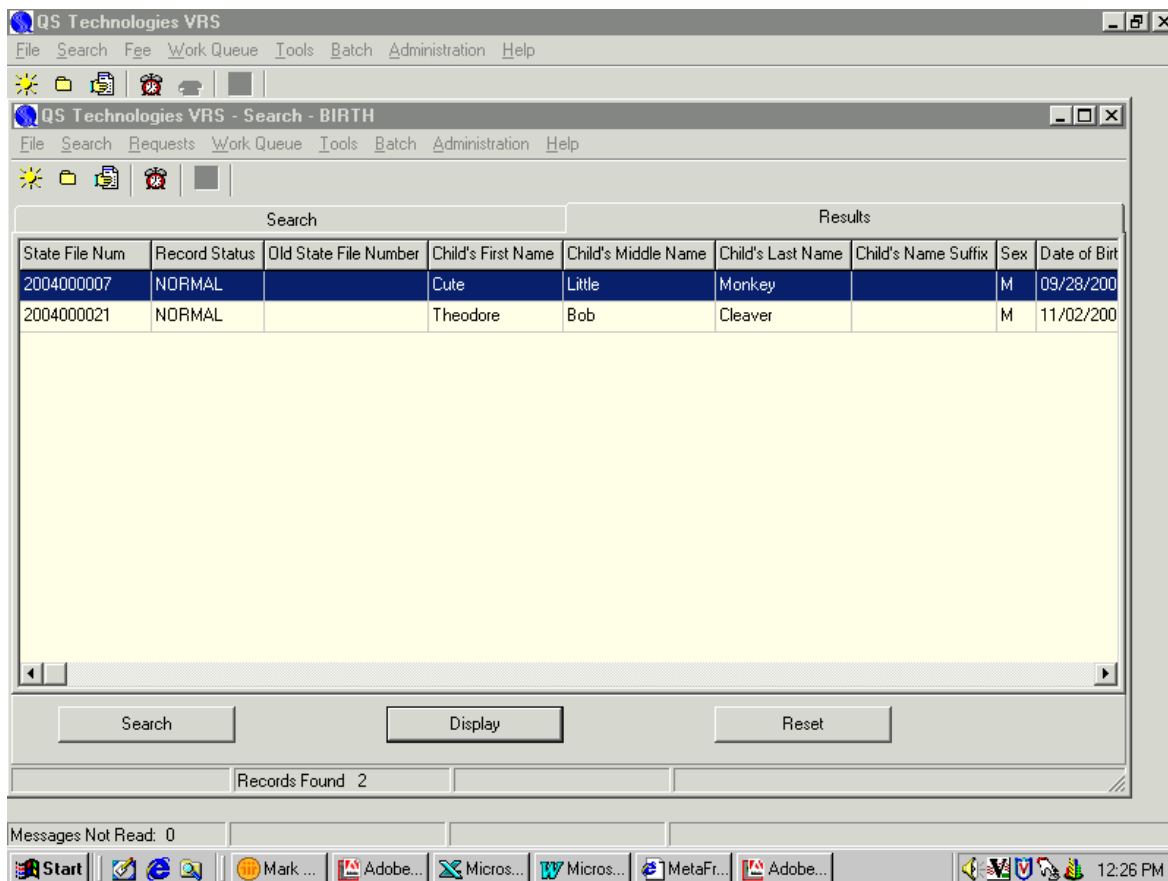
IN(A+B+C) – This search construction directs that at least one of the listed values be present - *either A or B or C*.

Other operators – These include >, >=, <>, <, <=. For example the operator >= will find records with a value greater than or equal to the rest of the search field entered. To find a last name that is greater than or equal to **M**, for example, the characters >=**M** would appear in the Last Name field. The <> operator means “**not equal to**”.

The lower part of the **Search Screen** contains three “action” buttons. They are:

SEARCH

This button allows the user to search for all matches of the criteria entered. After the **Search** button is clicked, those records meeting the match criteria, if any, will be displayed as entries on the **Results** tab. The user may then select a record by highlighting it, and double clicking the entry, hitting the **Enter** key, or clicking the **Display** button to display the desired record. The user can also click on any column to sort it. For example, clicking on Child’s Last Name will sort all Child’s Last Names in your results column in ascending alphabetical order. By clicking on it again, it will resort in descending alphabetical order.



Search Screen – Results Tab

DISPLAY

This button will display the record selected. Though stated before, **be aware** that if there is a misspelling, or an incorrect date, a record may not be retrieved, even though one exists.

RESET

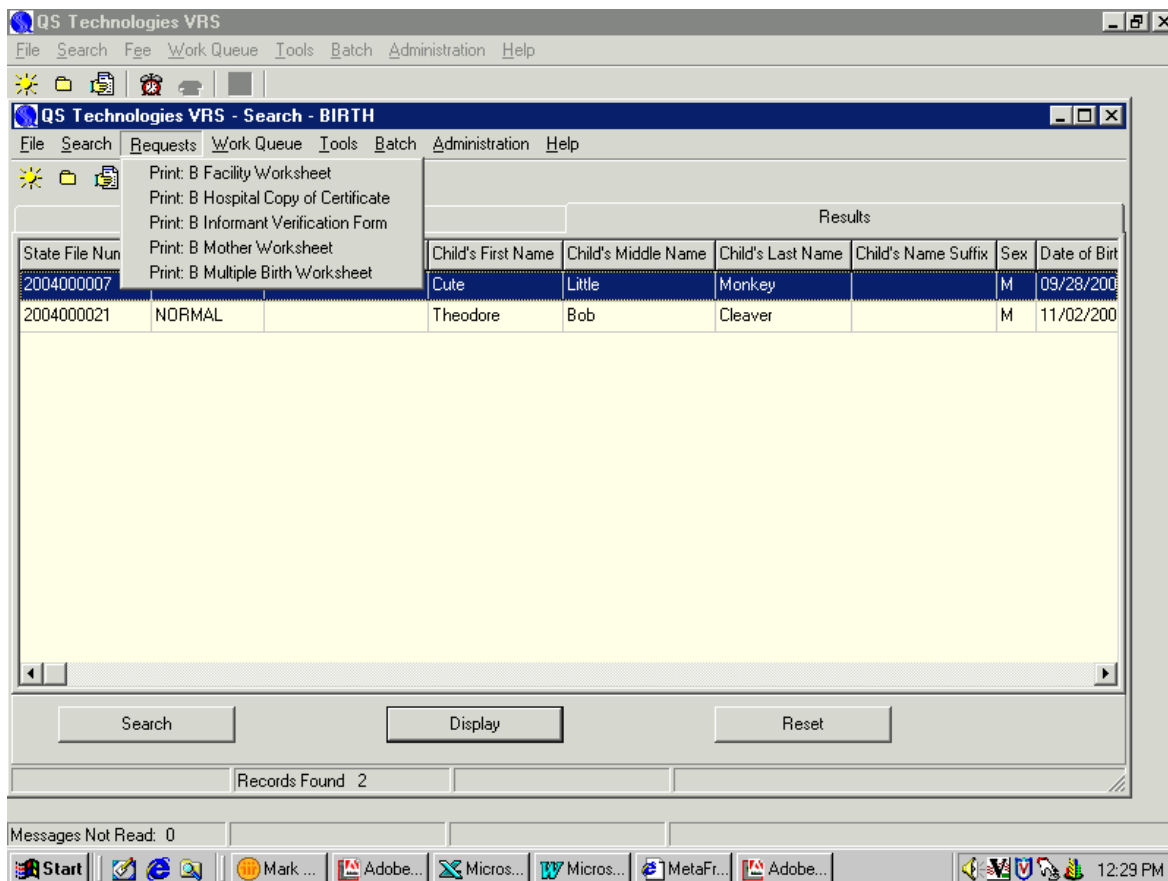
If criteria have been entered and need to be erased, click on this button.

Note that after the search is run, it is the **Results** tab which displays whatever matches may be found. From here, the user can display full Event records as outlined above, choose the **Reset** option which erases the results and brings the user back to the opening **Search** screen with the search criteria erased, or click on the **Search** tab which brings the user back to the opening screen (tab) with the original search criteria intact.

PRINTING A CERTIFICATE FROM SEARCH RESULTS

The system easily allows for the printing of documents - any number of which can be loaded into the system and made available to select groups of users.

After highlighting the record on the **Results** tab, or calling up and displaying the record itself³, click on **Requests** menu. This will display a pull down list with all printing options made available by the system for that user.

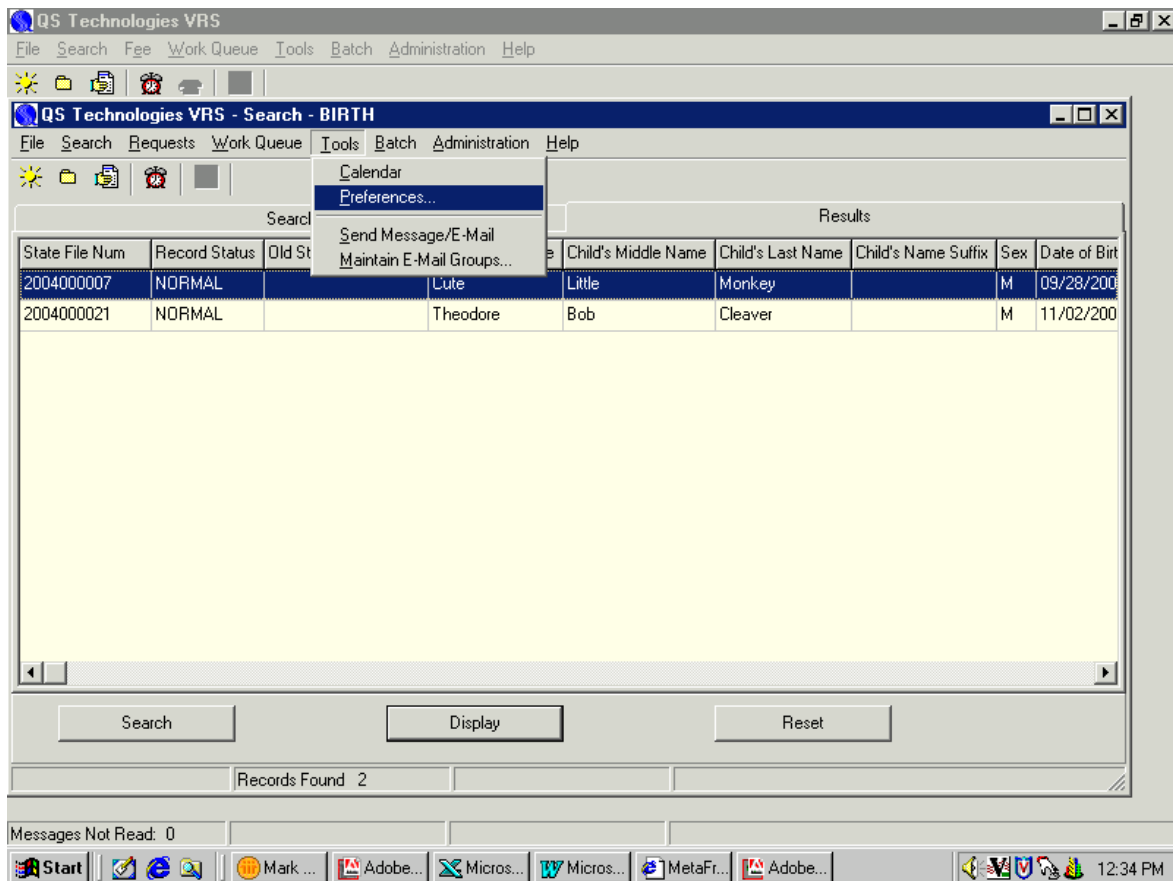


Search Screen Results Tab – Requests Menu

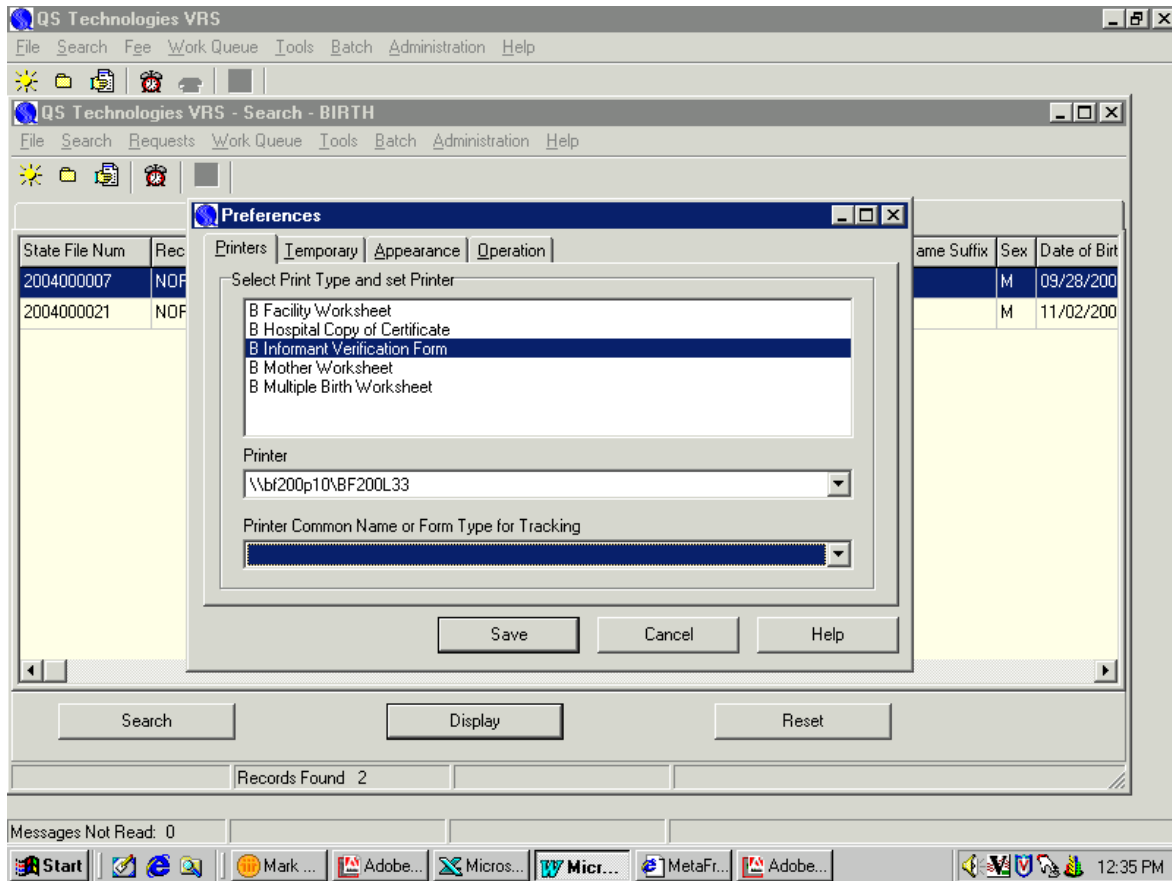
Using the mouse to point to the appropriate selection, or the arrow keys to scroll through them, highlight the desired printing selection and click or hit the **Enter** key.

If the system's **OK to Print** criteria are met for that record, the certificate or worksheet will be printed to the printer you select from the printer drop down list.

There are two important points here. First, note that the document / printer associations can be set, and changed when needed, through the **Preferences** utility. This utility is one of the selections found under the **Tools** menu as shown below.



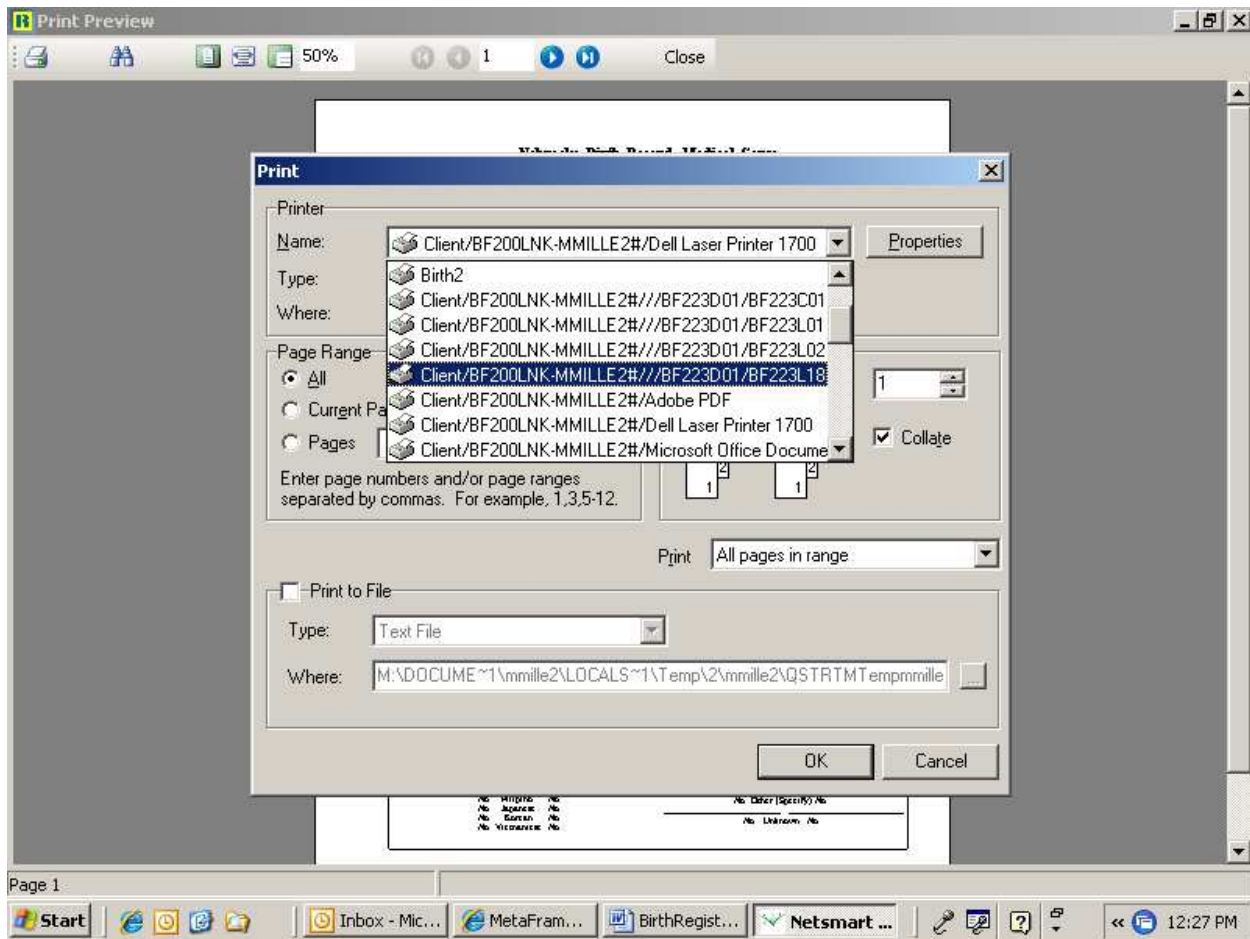
Tools Menu – Preferences Selection



Preferences Utility – Printers Tab

The **Preferences** utility allows an association with specific printers (even with specific printer trays) on a document by document basis.

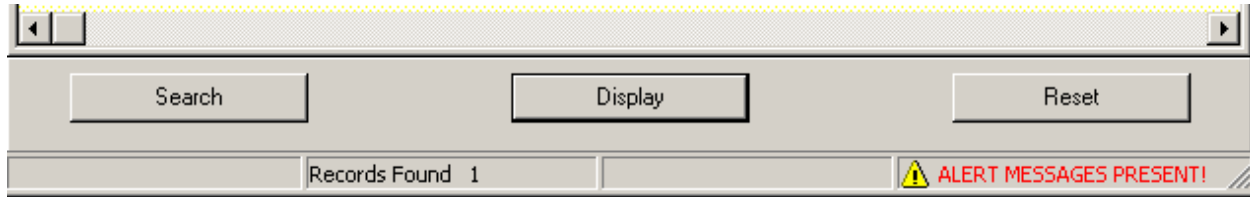
If the system administrator allows, you may not need to set your printer under preferences, but will have the option to select which printer when you print the record.



Different documents have different criteria associated with them which must be met in order for that document to print. Fortunately, the user does not need to be aware of what these criteria are. They are set up by either NetSmart or by the System Administrator. If the record does not meet one or more of the required criteria for printing, in addition to the document not being allowed to print, the user will be given a message stating why (what field values are lacking). Other messages may also be generated for the user as a result of his or her print command.

As a final note on document prints, depending upon the document in question and how it is set up within the system, you may or may not be able to see the document before the print and/or be prompted for a print confirmation. This varies from document to document and is determined by the system administrator.

Finally, the bottom **Search Screen** may contain an **Alert Messages** notation. This serves the same function, in an abbreviated manner, as the **Alert** dropdown box found at the top of the Event screens - making the user aware of any information alerts that are associated with a record.



Bottom of Search Screen Showing Alert Message

NOTES:



TABLE MAINTENANCE

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INTRODUCTION

The Table Maintenance System is both robust and flexible. The Hospitals will only be allowed to perform maintenance on their Birth Attendants.

Fortunately, the Table Maintenance System is easy to work with.

ACCESSING THE UTILITY

To begin this process, select the **Table Maintenance** menu item.



NetSmart Opening Screen Showing Administration Menu

RECORD LIST TAB

Calling up the Table Maintenance utility first brings up a blank screen as shown below. From here we can call up existing tables and their entries for examination or modification, or create new entries.

To be clear, the Table Maintenance utility is not used for creating new tables. The Table Maintenance utility's purpose is to maintain existing tables (such as the BIRATTEND table) and their entries and/or to create new entries within the table.

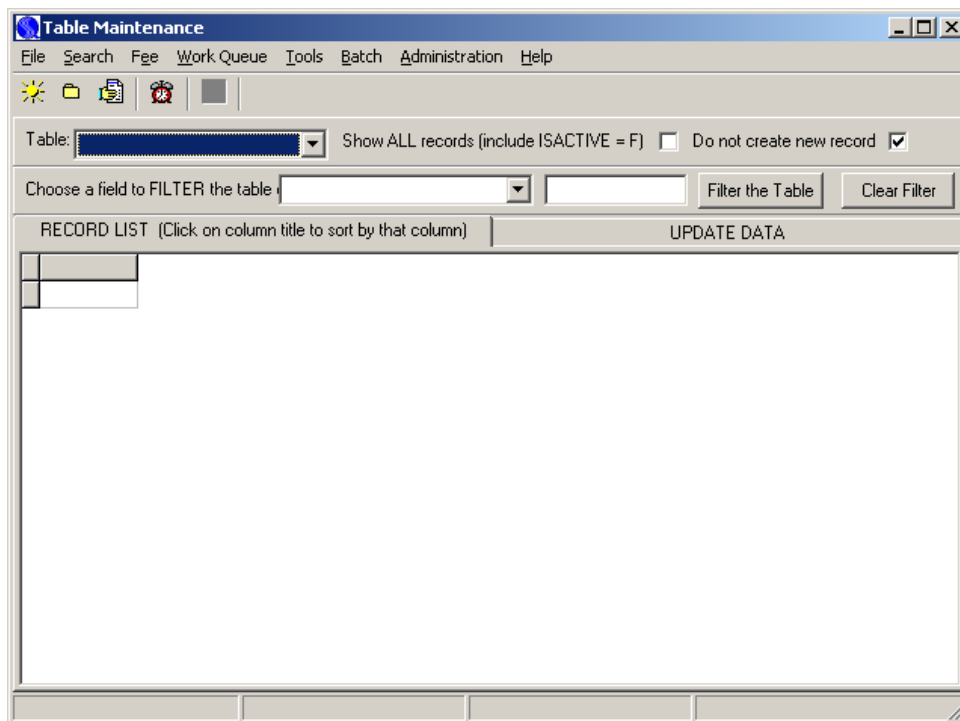


Table Maintenance Utility – Opening Screen

The **Table** dropdown menu in the upper left of the screen contains a list of those validation and system tables available for modification. When a table is selected from the list, those entries already input for that table are displayed. The **BIRATTEND** table is the only available table for the Hospitals.

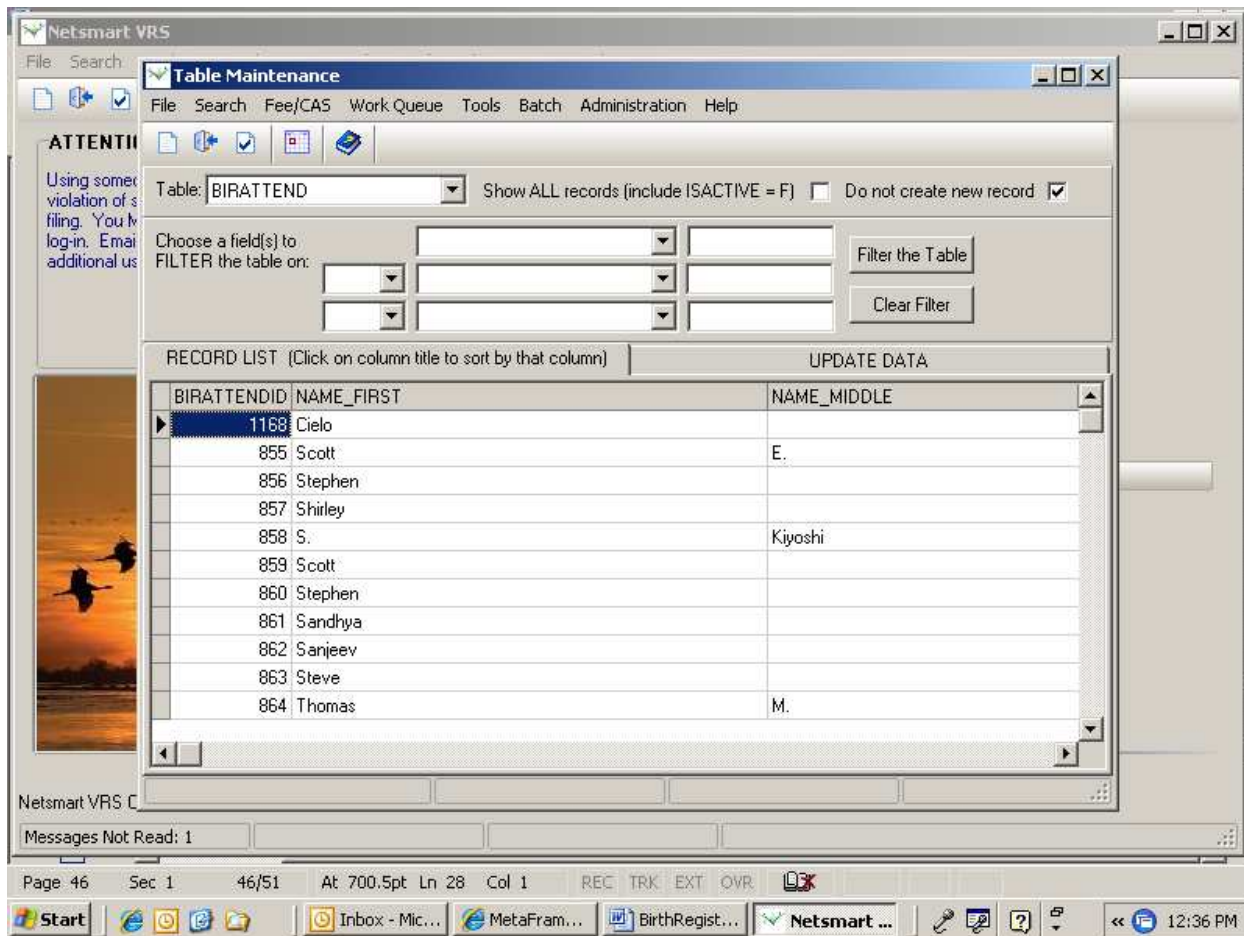


Table Maintenance Utility Showing Birth Attendant Table Entries

The **Show ALL Records (include ISACTIVE=F)** field is normally left unchecked, as shown above, as typically you will want only active records to display.

However, you may occasionally wish to display **inactive** records as well – perhaps for purposes of research or in order to **re-activate** an entry.

When the **Show ALL Records (include ISACTIVE=F)** field is checked, any **inactive** entries will additionally be displayed. As a note, records flagged as inactive are inactive to the entire system. They can be re-activated, as will be seen on the **UPDATE DATA** tab, or deleted entirely.

The next field to examine is the **Do not create new record** checkbox. It is typically left checked. When checked, new records can not be accidentally created while on the **UPDATE DATA** tab. This is in place as a safety feature. The system, in other words, makes you take the step of visiting this field in the event that new record creation is really desired.

The next field to look at is the **Choose a field to FILTER the table** dropdown. Depending on the hospital, this table can have dozens, if not hundreds, of entries. It can be advantageous to filter the entries so as to obtain some subset of them to work with. When working with the BIRATTEND table, for example, you may wish to look at that subset of entries as grouped by address or by zip code. Filtering can accomplish this for you.

The first step in filtering involves selecting that column you wish to filter on. The **Choose a field to FILTER the table** dropdown menu will list all columns for the current table. The **BIRATTEND** table contains the fields **NAME_FIRST**, **NAME_MIDDLE**, **NAME_LAST**, etc.

We will choose **ZIPCODE** for our example, though any field can be sorted on. After field selection, it is necessary then to specify the value within that field that you wish the system to filter on. This means that only those entries having that value will be displayed when the filtering occurs. By entering the zip code of 68131 and clicking on the **Filter the Table** button generates the following:

Table Maintenance

File Search Fee/CAS Work Queue Tools Batch Administration Help

Table: BIRATTEND Show ALL records (include ISACTIVE = F) ☐ Do not create new record ☒

Choose a field(s) to FILTER the table on: ZIPCODE 68131 **Filter the Table** **Clear Filter**

RECORD LIST (Click on column title to sort by that column) UPDATE DATA

BIRATTENDID	NAME_FIRST	NAME_MIDDLE
1168	Cielo	
855	Scott	E.
856	Stephen	
857	Shirley	
858	S.	Kiyoshi
859	Scott	
860	Stephen	
861	Sandhya	
862	Sanjeev	
863	Steve	
866	Tama	

Netsmart VRS C

Messages Not Read: 1

Page 48 Sec 1 48/51 At Ln Col REC TRK EXT OVR

Start Inbox - Mic... MetaFram... BirthRegist... Netsmart ... 12:38 PM

Filter Dropdown Menu Showing ZIPCODE Field Selection

This filtering process can occur as many times as desired – with the results of the filtering operation cleared by means of the **Clear Filter** button.

Looking now at the composition of the entries within this table, from left to right, we will begin with the system-generated identifier, **BIRATTENDID**.

This unique table entry identifier reflects the order in which the entry was input into the table.

Next, are self-explanatory fields **NAME_FIRST**, **NAME_MIDDLE**, **NAME_LAST**. The **NAME_SUFFIX** field is for name titles such as Jr., Sr., etc. The **TITLE** column indicates if the attendant was an MD, PA, CNM, etc. If you are unsure what to put here, please contact the System Administrator. **FAC_CODE** is a unique code for each hospital that we carried over from the original Electronic Birth System. The **ISACTIVE** column indicates if that description is still active (currently being used) in the system. And the **MODIFY_USERID** column identifies, with a system-generated number, the user who created an entry or who last modified an existing one. The remaining fields are self-explanatory except the last column. This column, **NAME_LMFS**, or last name- first name sort contains the way the drop down appears when entering the birth record.

UPDATE DATA TAB

The following screen shows the contents of the **Update Data** tab where new table entries are entered or existing table entries are modified. This screen shows the entry for Michael Cohen. The fields we encountered on the **RECORD LIST** tab are all available for viewing and/or modification as well.

For tables that have a large number of fields, the screen would present a scroll bar and arrows.

The two fields towards the top of this screen, **Show ALL records** and **Do not create new record**, as seen earlier, can be viewed from either tab; however, the **Do not create new record** checkbox can **only** be set from the **RECORD LIST** tab.

The screenshot displays the 'Table Maintenance' application window. The title bar reads 'Table Maintenance'. The menu bar includes 'File', 'Search', 'Fge', 'Work Queue', 'Tools', 'Batch', 'Administration', and 'Help'. Below the menu bar is a toolbar with icons for a sun, a folder, a document, a clock, and a trash can. The main area is divided into two tabs: 'RECORD LIST' (selected) and 'UPDATE DATA'. The 'RECORD LIST' tab contains a table with one record for 'Michael Cohen'. The 'UPDATE DATA' tab is active, showing a form for editing the record. The form includes fields for 'NAME_FIRST' (Michael), 'NAME_MIDDLE' (D.), 'NAME_LAST' (Cohen), 'NAME_SUFFIX' (empty), 'NCHS_TITLE_CODE' (empty), 'TITLE' (MD), 'FAC_CODE' (0246), 'MODIFY_USERID' (217), 'MODIFY_DATE' (09/07/2004), 'USER_LOCATION_CODE' (Nebraska Methodist Hospital), 'ADDRESS1' (13930 Gold Cir. #102), 'ADDRESS2' (empty), 'CITY' (Omaha), 'STATE' (Nebraska), and 'ZIPCODE' (68144). At the bottom of the form are buttons for 'Previous', 'Next', 'Insert as New', 'Update', 'Cancel', 'Deactivate', 'Reload', and 'Delete'. The Windows taskbar at the bottom shows the Start button and several open applications: Mark Mill..., Adobe R..., Microsoft..., Micros..., MetaFra..., Adobe R..., and a system clock showing 2:23 PM.

Table Maintenance – Update Data Tab

The filter related fields can be employed from this screen; however, the system will automatically take the user back to the **RECORD LIST** tab to display the filtering results.

At the bottom of the screen, note the buttons **Previous**, **Next**, **Insert New** (grayed-out here because the **Do not create new record** checkbox is checked), **Update**, **Cancel**, **Deactivate**, **Reload** and **Delete**.

The **Previous** and **Next** buttons allow the user to scroll through the various existing table entries without having to return to the **RECORD LIST** tab to bring up the entries on this tab.

The **Insert New** button, as its name implies, is for creating a new table entry. Creating a new entry is done by typing over any existing entry information and then clicking on the **Insert New** button. The **Do not create new record box** needs to not be checked beforehand.

The **Update** button allows the user to update an already existing entry. Assume, for example, that the address for the above had a typo and needs to be corrected. The appropriate table entry is first brought up on the **UPDATE DATA** tab, the address is overwritten, and then the **Update** button is clicked. To check that the update was successful, simply return to the **RECORD LIST** tab to review the modified entry.

The **Cancel** button allows the user to leave the **Update Data** tab without having any proposed changes implemented.

The **Deactivate** button deactivates a table entry – leaving that entry present within the system but unavailable for future use. This is useful if an Attendant no longer delivers at your hospital and you don't want them on the drop down menu to choose from. Simply, pull the record up and click on the deactivate button. This will leave the Attendant available for the older records, but not available on your drop down list when entering new records.

The **Reload** button reloads the table entry updating the value in its **MODIFY_DATE** field. This may be useful in cases of **Client/Server** deployment where a resend of table entries to local sites is desired. A reload, with its concomitant change of date, now makes possible a resend as any table modification functions as a resend trigger. We are not using Client/Server deployment so **this will not need to be used**.

The **Delete** button, to be used with great discretion, deletes a table entry in its entirety. *No record of a table entry will exist once it has been deleted.* The user **should not** use this function unless the birth attendant was added and never used. Entries once used, that are no longer to be used, *should be deactivated* so as to leave a record of that entry's history.

The following are the options when the do not create new record is unchecked.

The screenshot shows the 'Table Maintenance' application window. The 'Table' dropdown is set to 'BIRATTEND'. The 'Show ALL records (include ISACTIVE = F)' checkbox is checked, and the 'Do not create new record' checkbox is unchecked. The 'FILTER the Table' section has 'ZIPCODE' selected with the value '68131'. The 'UPDATE DATA' tab is active, displaying a form for an attendant record. The fields are as follows:

- NAME_SUFFIX: (empty)
- NCHS_TITLE_CODE: (empty)
- TITLE: MD
- FAC_CODE: 1221
- MODIFY_USERID: 217
- MODIFY_DATE: 09/07/2004
- USER_LOCATION_CODE: Creighton Univ. Med. Center
- ADDRESS1: 601 N. 30th St.
- ADDRESS2: (empty)
- CITY: Omaha
- STATE: Nebraska
- ZIPCODE: 68131
- NAME_LMFS: Menolascino, Scott

At the bottom of the form, there are buttons: Previous, Next, Insert as New, Archive+New, Cancel, Deactivate, Reload, and Delete. The Windows taskbar at the bottom shows the Start button and several open applications: Inbox - Mic..., MetaFram..., BirthRegist..., Netsmart, and a clock showing 12:49 PM.

Notice that two new selections are available. The **Insert as New** is one of the options now available. When you have a new certifier to add, display an existing record (it is recommended that the record displayed matches closely to the attendant that is being added such as the same address so you have less information to change), make the required changes such as the name, address, title. It is important to remember to change the last field on the screen which is the attendants name in last, first, middle order. This is the way the name will appear on the drop down when entering the birth record. Leave the fac_code as it is shown for your facility. After you make the changes, select Insert as New. It will leave the attendant in the table that you typed over and insert the new information into the table.

The **Archive+New** should be used in cases where the original information for an attendant needs to be retained for the older records but something was changed that should only be used for future records. This option will archive or deactivate the original record and create a new active entry with the update information. This option is useful for attendants that change locations (new address).

For the table changes to take affect, the user will need to re-log back into the system.